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1 Introduction

1.1 Rule Overview

Under the Final Rule released by CMS on July 15, 2013 (**42 CFR Parts 431, 435, 436, 438, 440, 447, and 457**), hospitals may choose to offer “presumptive eligibility” (PE) to patients who appear to be eligible for Medicaid. The Final Rule implements provisions of the Patient Protection and Affordable Care Act and the Health Care and Education Reconciliation Act of 2010 (collectively referred to as the Affordable Care Act). Under the Final Rule, states are required to make available a hospital-based presumptive eligibility (HBPE) program. Although the availability of the program is mandatory, hospital participation is optional. Hospitals that choose to enroll in their state’s program make hospital-based presumptive eligibility determinations on patients who do not have another form of health coverage. If the individual is found presumptively eligible, the patient would be temporarily covered by Medicaid

1.2 Impact on Hospitals

Presumptive Eligibility was designed to identify and provide coverage for individuals who are likely eligible for Medicaid but are not currently enrolled. If a hospital elects to participate in the HBPE program, they are required to adhere to the BMS policies and procedures that govern the program. Services provided by the hospital during the HBPE period may be billed to West Virginia Medicaid if the individual is determined to be presumptively eligible. West Virginia hospitals that are participating Medicaid providers under the State Plan that opt in to the HBPE program will be required to designate the employees who will make the HBPE determinations and assist eligible individuals with the full Medicaid Application.

1.3 Hospital Employee Role Overview

You have been selected by your employer to be trained in to make HBPE determinations. To be considered an Authorized Hospital Employee (AHE), you must participate in the training and pass the certification test. You must either assist the Presumptively Eligible (PE) patient in submitting their full Medicaid application immediately after their PE determination or assist the patient at a later time. You can manually transfer all necessary patient intake information that the hospital gathered in the registration process into the PE patient’s HBPE questionnaire. Once the patient’s information is entered, you should ask the patient the determination questions and repeat the answers they gave back to them to confirm that the information entered is correct.

2 Privacy and Security

All patient information gathered for PE determination and full Medicaid application must be kept confidential by the AHE and any other hospital employee who may access to the information. This includes not providing information to their employer, unless he/she has written permission from the Bureau for Medical Services to access this information. AHEs must:

1. Treat all available data as confidential information.
2. Keep passwords secured and confidential, i.e., passwords cannot be shared with co-workers or other individuals.
3. Access the online computer system using his/her own ID and password.
4. Not access or request any information that is not necessary for making PE determinations or submitting the full Medicaid application.
5. Not leave WV inROADS open unless it is secured to the extent that no one else will be able to access, use, or view the data.
6. Not disclose confidential information even after the termination of employment or the business relationship, unless specifically waived in writing by the Bureau.

3 Process for Making a Presumptive Eligibility Determination

3.1 When to use Hospital-Based Presumptive Eligibility

- Individuals who do not have any health care coverage
- Individuals who are West Virginia residents
- Individuals who are:
 - Children under Age 19
 - Pregnant Women
 - Adults between ages 19 and 64
 - Former West Virginia Foster Care Children under age 26
 - Certain Individuals Needing Treatment for Breast or Cervical Cancer
 - Incarcerated Individuals With Hospital Stays Exceeding 24 Hours

Incarcerated Individuals will be easily identifiable by the Corrections Officer that the patient will be accompanied by. Once an incarcerated individual has stayed in the hospital for 24 hours or more, the AHE will assist them in applying for HBPE just like any other patient, making a note in the comments field of the application that the applicant was an incarcerated individual. The AHE will not be required to complete a Medicaid application for these individuals. The prison will complete that portion of the process.

You will use an account in the WV inROADS system to complete the HBPE questionnaire. Upon completion of the HBPE application, you will be able to review the responses to each question and make the determination for the patient. If the patient is PE, you will print out the temporary medical card which will act as a notice to the patient that they are now temporarily covered by WV Medicaid. If the patient is determined ineligible for PE, you will print the determination notifications, select the appropriate reason, and give that document to the patient as a notice of ineligibility for PE. WV inROADS will then provide you with the option to continue on to the full Medicaid application. It is highly recommended that you work with the patient to submit the full application immediately after the PE determination rather than trying to follow up with the patient at a later time. The State will be tracking the completion percentage of full applications by PE patients.

However, if the patient or authorized representative is unable or unwilling to complete the full Medicaid application at that time, you will tell the patient or AR of the different options they have to complete the Medicaid application including:

- Follow up with AHE at the hospital at a later date or time.
- Follow up with the AHE over the phone. **Note: if the patient indicates that they would like to complete their application via the telephone, you must have them call 1-877-716-1212. Explain that they must call this number because they will be required to give a recorded, telephonic signature.**

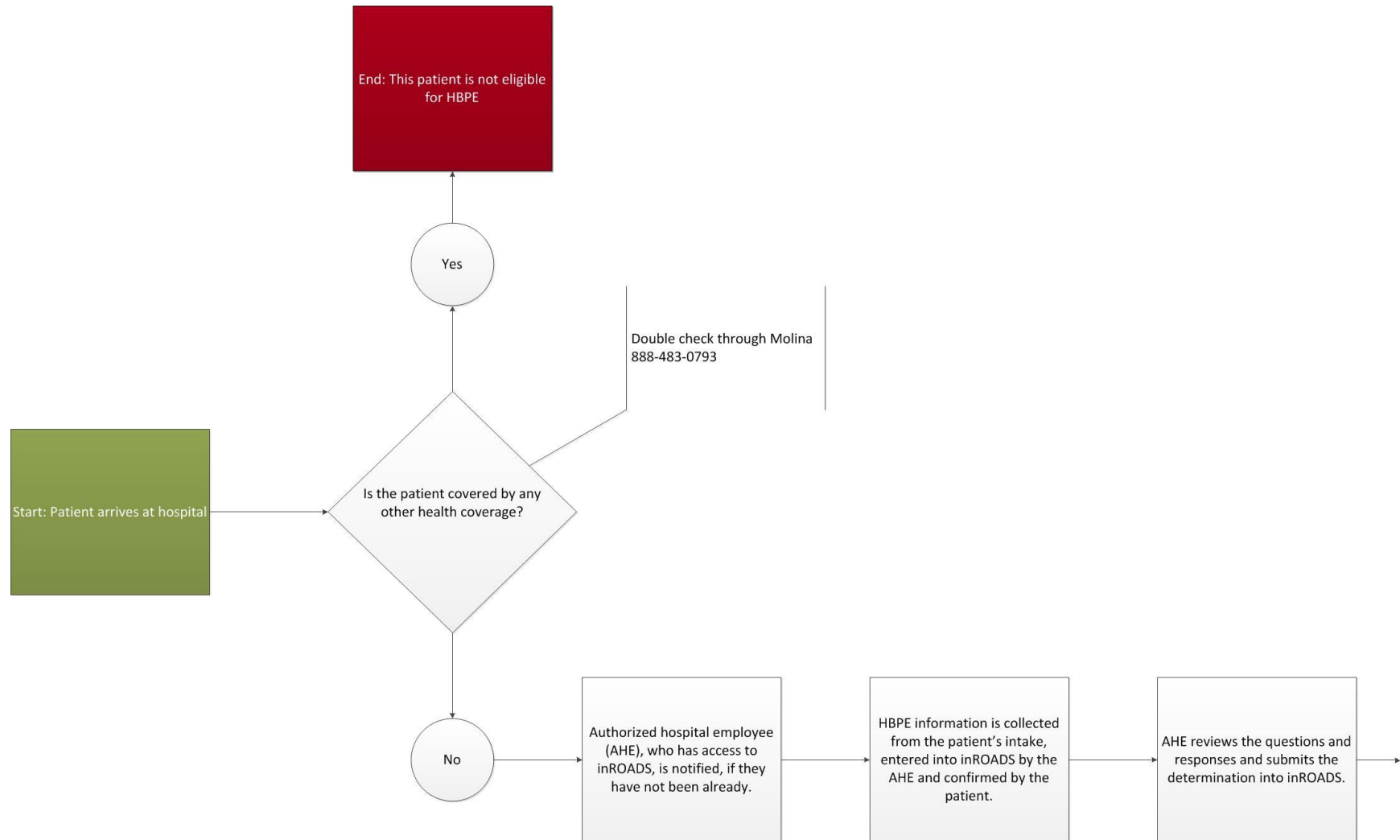
- Go through WV inROADS at www.wvinroads.org.
- Offer to print out Medicaid application for the patient to take home. They can drop it off at the hospital at a later date for the AHE to enter into WV inROADS or take it to their local DHHR office.
- With a Community Partner.

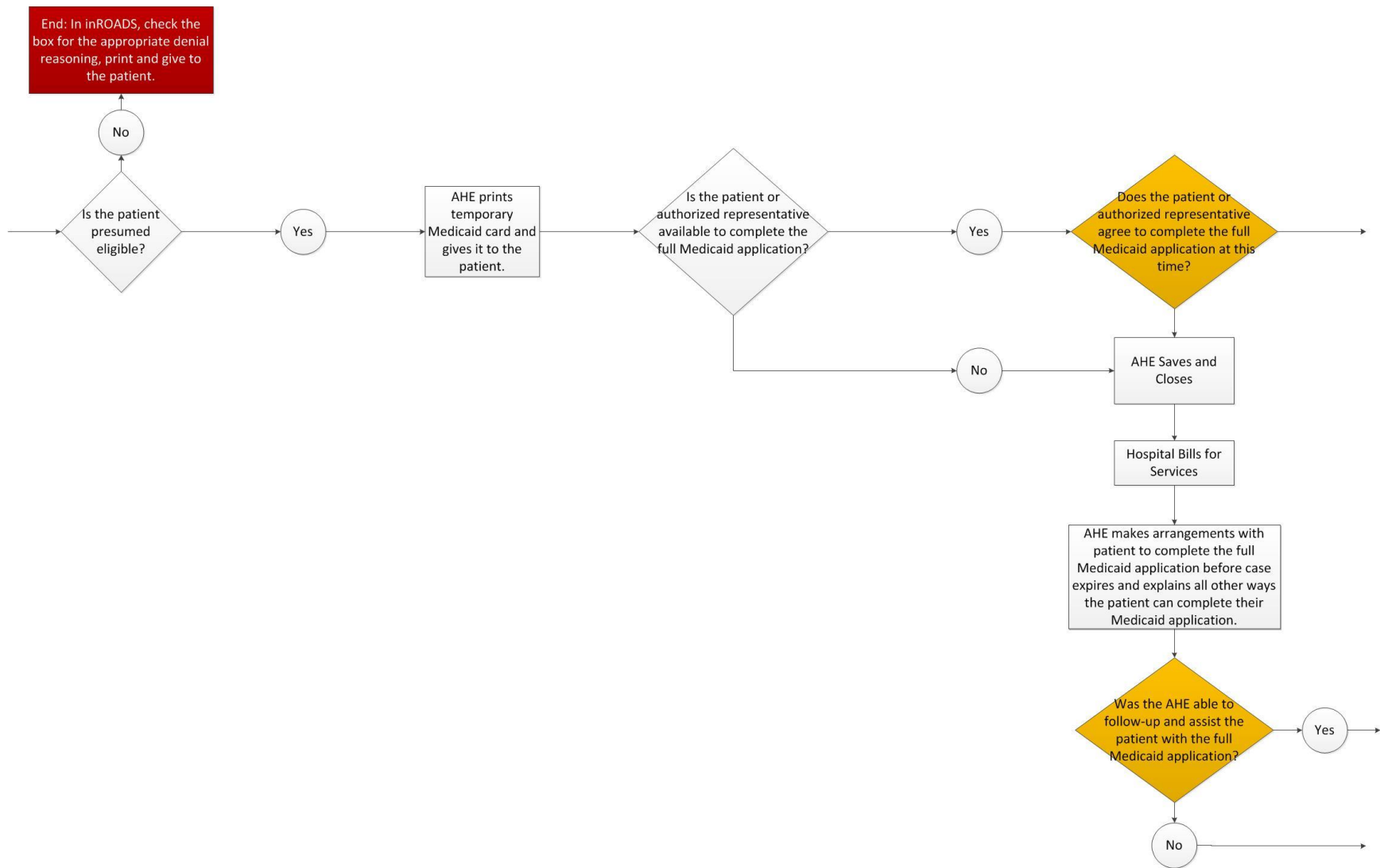
3.2 Desktop Manual

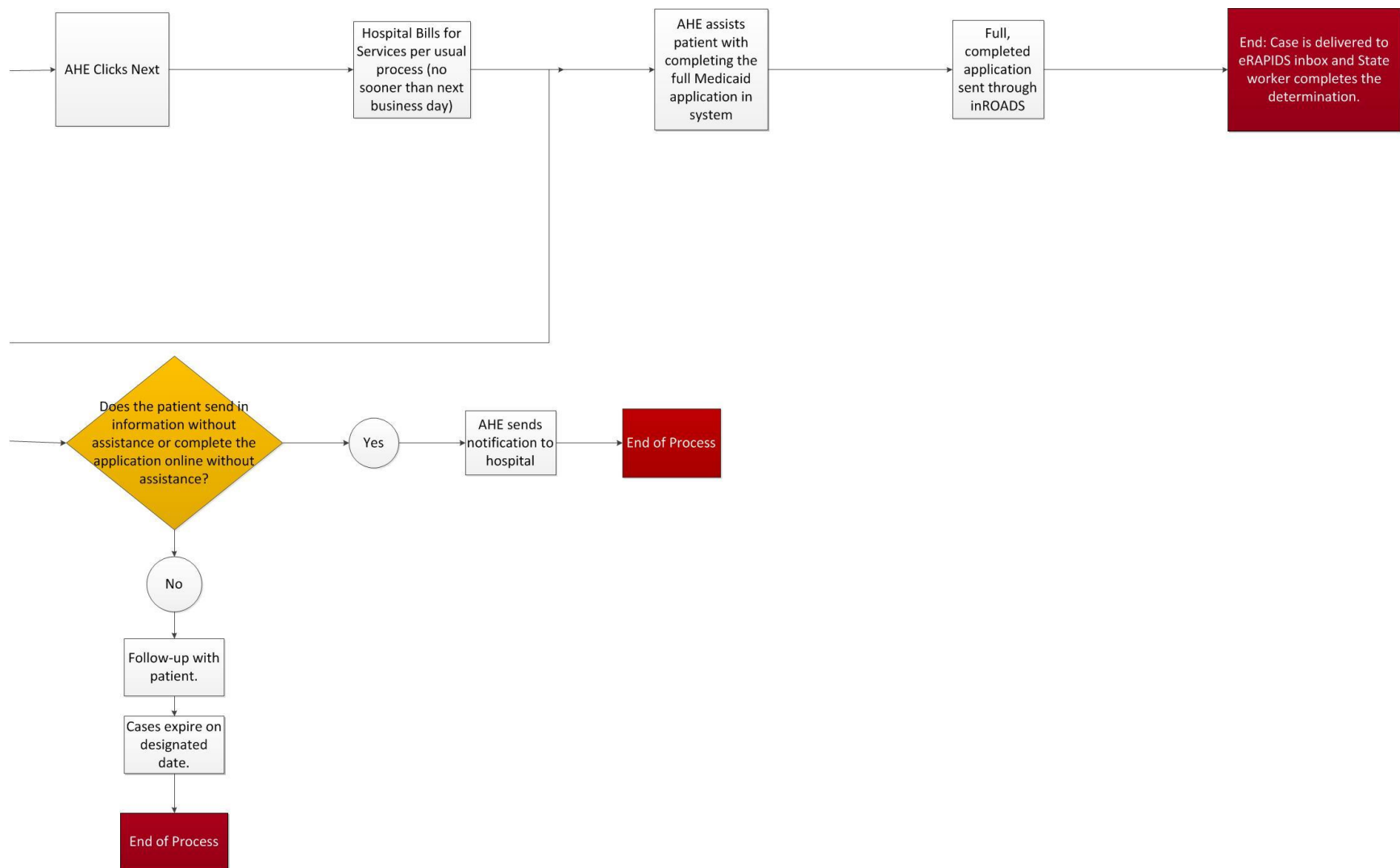
The Desktop Manual will be available for the hospital administrator and AHE to review at any time. For detailed step-by-step documentation, please download the desktop manual at <http://www.dhhr.wv.gov/bms>.

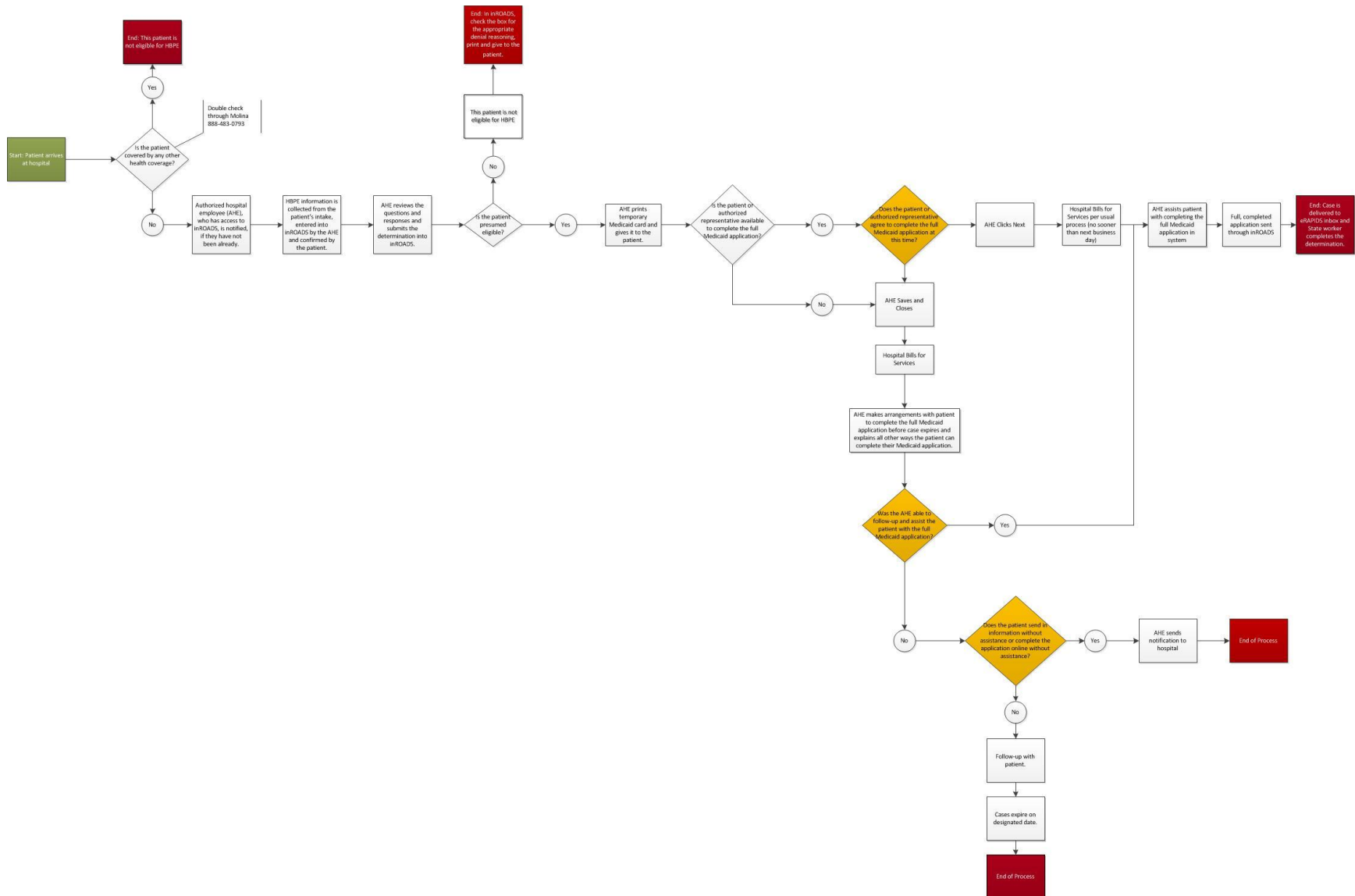
3.3 Steps for Making a Determination

The steps for making a determination are as follows:









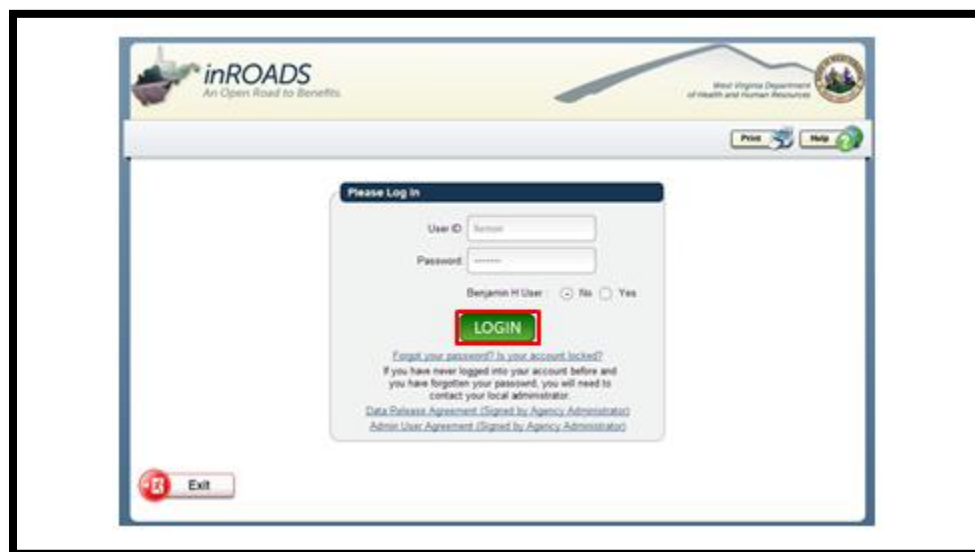
3.3.1 WV inROADS Process

1. Now that we've gone through the step by step process of making a PE determination, we will walk through the same process inside the system of WV inROADS so all the screens will seem familiar when you perform your first determination.

This screen is the first screen you will work with at www.wvinroads.org. To enter the HBPE portal, you will select the icon of two hands shaking that reads "Partners/Providers."



2. Next, you will sign in with your User ID and Password that you will set up with your system administrator. Each hospital will have their own system administrator that will manage the user IDs and portal access. If you forget your password, select "Forgot your password" and follow the steps to retrieve it.



3. Once you have logged on for the first time, you can review the HBPE User Agreement in the system. Once you agree to all the terms and conditions, you can enter your information and select “continue” in the bottom right hand corner. This is a one-time process. You will not be required to sign the User Agreement each time you log in.



4. This is your dashboard, which we will discuss in greater detail in a few minutes. But the button that will begin the PE determination process is in the top right hand corner, “Start a Presumptive Eligibility Application”.



5. This is the first page of the HBPE questionnaire. The required fields are indicated by the red font reading “required” in parentheses. Even though some of these fields are required and some are not, you should ask the patient for all of the fields. Just understand that if the field is not required and the patient or the person with reasonable knowledge regarding the patient’s status refuses or cannot answer, you can leave that field blank and move to the next field in the questionnaire. Additionally, remember that all answers are based on patient attestation and you cannot ask to verify the information. Whatever answer the patient gives is what you should be entering into the questionnaire. If you already have this information from the hospital admission process you may enter the information and simply verify the fields are correct with the patient. Once this page is complete, select “next”.

The screenshot shows the 'Personal Information' section of the inROADS questionnaire. The form includes fields for 'First Name', 'Middle Initial', 'Last Name', 'Gender', 'Date of Birth', 'Social Security Number', and 'Language'. Each field is followed by '(required)' in red text. There are radio buttons for 'Yes' and 'No' for the questions 'Has this person been approved for presumptive eligibility in the last 12 months?' and 'Is this person a US citizen or national?'. A red box on the left side of the form contains the text: 'Note the required fields that you must collect from the patient'. At the bottom right, there is a red 'Next' button.

6. On this page you will continue to gather information such as the patient’s residency and contact information. When complete, select next.

The screenshot shows the 'Residency Information' and 'Contact Information' sections of the inROADS questionnaire. The 'Residency Information' section includes fields for 'Address', 'City', 'State', 'Zip', 'County', 'Country', 'Phone', and 'Fax'. The 'Contact Information' section includes fields for 'Primary Phone', 'Secondary Phone', 'Cell Phone', and 'Email Address'. Each field is followed by '(required)' in red text. There are radio buttons for 'Yes' and 'No' for the question 'Is this person's mailing address different from their home address?'. At the bottom right, there is a red 'Next' button.

7. This is the last page of questions for the HBPE determination. Here you will ask whether the patient is a pregnant woman, a former West Virginia foster care member, a breast or cervical cancer patient, or a parent/caretaker over the age of 65. If the system has registered that the patient could not be a member of one of these groups the accompanying question will not appear in that patient's questionnaire. For example, if the patient is male, the pregnancy question will not appear when you are determining his presumptive eligibility.

Please note that if the patient indicates that yes, they were in West Virginia foster care at age 18 or older, you must confirm that the patient is also under 26 years of age at the time of their determination for them to be presumptively eligible.

For the breast and cervical cancer question, if the patient indicates yes, you may use the links on your AHE dashboard to point that patient to a screening facility that is convenient for them. The patient is not required to go to the screening facility to be presumptively eligible. However, you should inform them of where they can go to be screened if they choose.

The image shows a screenshot of the inROADS (West Virginia Department of Health and Human Resources) HBPE determination questionnaire. The form is titled "HBPE Determination" and includes several sections with questions and radio button options for "Yes" or "No". The sections are: "Pregnancy Information" (question: "Is this person pregnant?"), "Foster Care" (question: "Was this person in West Virginia foster care at age 18 or older?"), "Breast and Cervical Cancer Patients" (question: "Is this person currently being treated for breast or cervical cancer?"), "Parents / Caretakers Over 65" (question: "Is this person a parent/caretaker of an individual 18 years of age or younger?"), and "Residence Information" (question: "How many individuals are included in this person's household on this federal tax return?" and "What is the household's adjusted income?"). The "Next" button at the bottom right is highlighted with a red box.

8. This is the review screen. Here you will be able to see a check mark for yes, this patient attested to being a part of one of these groups or the red no entry icon to indicate that they answered their questions in such a way that the system read that they were not a member of the group. However, you should not rely solely on these icons. As we discussed on the previous screen, it is up to you to think through the patient's answers and make a decision on eligibility. A good example of where the icon would not match would be if the patient was 40 years old and was a West Virginia foster care member over 18 years old. They would select yes to the foster care question on the previous screen, but they are not under 26 years of age and therefore that patient is not a member of the former West Virginia foster care MAGI group. Another example would be if based on your experience with a patient, you deduce that he/she has been determined PE in the last 12 months or that they are currently covered by insurance even if they say they have not.

On this screen, you will review what the patient has told you and make your PE determination based on the patient's attestations. Keep in mind that the State will be measuring how accurate the PE determinations are by reporting on the percent of patients who were found presumptively eligible AND Medicaid Eligible. Therefore, it is important for the AHE to review the information and use their best judgment to make a determination rather than relying completely on the WV inROADS results page.

Once you choose "yes, this person is eligible for Presumptive Eligibility" or "No, this person is not eligible for Presumptive Eligibility," click "Submit Determination" to move on to the next step.

The screenshot displays the 'inROADS' interface for 'Presumptive Eligibility Criteria Summary'. It features a table with the following criteria and results:

Eligibility Criteria	Results
NOT approved for PE in last 12 months	Yes (checked), No (unchecked), N/A (unchecked)
Citizenship	Yes (checked), No (unchecked), N/A (unchecked)
Resident of West Virginia	Yes (checked), No (unchecked), N/A (unchecked)
Household	Yes (checked), No (unchecked), N/A (unchecked)
Pregnancy	Yes (checked), No (unchecked), N/A (unchecked)
West Virginia Foster Care	Yes (checked), No (unchecked), N/A (unchecked)
Medicaid and Certain Care or Patient	Yes (checked), No (unchecked), N/A (unchecked)
Parent / Caretaker Over 65	Yes (checked), No (unchecked), N/A (unchecked)

Below the table, there is a section titled 'Hospital Determined Presumptive Eligibility Status' with two radio buttons: 'Yes, this person is eligible for Presumptive Eligibility' and 'No, this person is not eligible for Presumptive Eligibility'. A red box highlights the 'Submit Determination' button.

9. If you have determined the patient to be PE, the Print Information section will appear on the screen. Press the Print PDF button to print the patient's temporary medical card.

The screenshot displays the 'inROADS' web application interface. The main content area is titled 'Presumptive Eligibility Results' and contains a table with columns 'Eligibility Criteria' and 'Results'. The table lists various criteria such as 'HST completed for PE in last 12 months', 'In-Business', 'Residence in United States', 'Health Insurance', 'Employment', 'Valid Foreign Driver's License', 'Resident and Current on List of 100', and 'Resident in Jurisdiction (State or DC)'. Each criterion has a corresponding 'Yes' or 'No' result, often with a percentage. Below the table, there are sections for 'Eligible Presumptive Eligibility Status' and 'Print Information'. The 'Print PDF' button is highlighted with a red box. To the right of the screenshot, a red box contains the text 'Print temporary medical card'.

Eligibility Criteria	Results
HST completed for PE in last 12 months	Yes (100%)
In-Business	Yes (100%)
Residence in United States	Yes (100%)
Health Insurance	Yes (100%)
Employment	Yes (100%)
Valid Foreign Driver's License	Yes (100%)
Resident and Current on List of 100	Yes (100%)
Resident in Jurisdiction (State or DC)	Yes (100%)

10. This is what the Temporary Medical Card will look like. The patient will be able to take this card to the pharmacy to pick up their prescriptions the same day as their PE determination. They should also bring this card with them to any healthcare visit they have during the eligibility period. You should note that instead of an end-date, there is an “up-to” field. This is because the patient’s presumptive eligibility period can end at the latest on the last day of the following month from when their determination was made. However, if the patient applies for Medicaid, their presumptive eligibility ends on the date of their Medicaid determination. If they are determined eligible for Medicaid, their coverage will be replaced with full Medicaid coverage and if they are determined ineligible, their presumptive eligibility coverage will end on that date and the patient will no longer be covered.

Also included on the page that includes the Temporary Medical Card will be the following language for the patient notifying them that they now have temporary health coverage:

Use this temporary Medicaid card as verification of coverage.

Based on the information provided, you have been determined presumptively eligible for Medicaid, however to ensure your coverage continues after the date on the card above you need to complete and submit a completed Medicaid application. If you do not complete a full Medicaid application by the expiration date your coverage will end. The person who helped you be determined presumptively eligible may assist you in completing the full application.

If you or other members of your household are interested healthcare coverage or you are interested in applying for eligibility for other programs (including full Medicaid eligibility), please go to <https://www.wvinroads.org> or call 877-716-1212.

Please note: patients do not have the right to an appeal for presumptive eligibility determinations.

After you print out this card, you will give it to the patient and ask if the patient or an authorized representative of the patient is able to complete the full Medicaid application at this time.



The “full application” button will appear at the bottom of the screen and you can continue to the full application if the patient or their authorized representative is available and willing to proceed.

The ways that a patient can complete their full Medicaid application are:

- Following up with AHE at the hospital in person at a later date or time.
- Offering to print out Medicaid application for the patient to take home and fill out, they can drop it off at the hospital for the AHE to enter into WV inROADS for them or take it to their local DHHR office.
- Following up with the AHE over the phone. **Note: if the patient indicates that they would like to complete their application via the telephone, you must have them call 1-877-716-1212. Explain that they must call this number because they will be required to give a recorded, telephonic signature.**
- Going through WV inROADS at www.wvinroads.org.
- With a Community Partner (you can use the AHE dashboard to point them to a Community Partner near them and we will point this out in a few minutes).

So we have now seen how to proceed to the full application if the patient is determined presumptively eligible. Now we will look at what happens if we determine the patient ineligible or if the system recognizes the patient from a previous PE determination.



12. If the patient gives you their social security number and they have been approved for presumptive eligibility in the last 12 months under the same social security number, the system will alert you with a warning but you need to evaluate the situation.

Remember that each person is only supposed to be determined presumptively eligible once every 12 months unless:

- The patient is currently pregnant OR
- The patient was pregnant during their previous eligibility determination.

If you have a female patient that gets this error, you will know from the questionnaire if the patient is currently pregnant. If they are, you can determine her eligible and disregard the error. If they are not (if they answered no to the pregnancy question on the previous page), it is up to you to ask the patient if she was pregnant for her last presumptive eligibility determination. If she attests that she was indeed pregnant for her last determination, you can disregard the error and determine her eligible. However, if she attests that she was not, you can make the decision to determine her ineligible since she has already had her one presumptive eligibility determination in the past 12 months.

Similarly, if you see this warning and the patient is male, it is safe to say that you will need to select the “No, this person is not eligible for Presumptive Eligibility” option and follow the steps on the next slide.

The screenshot shows the inROADS system interface. At the top, there is a header with the inROADS logo and navigation buttons. Below the header, a warning message is displayed: "Warning: An individual with this SSN has been approved for Presumptive Eligibility in the last 12 months. Please evaluate accordingly." Below the warning, there is a table titled "Presumptive Eligibility Criteria Summary". The table has two columns: "Eligibility Criteria" and "Results". The table lists several criteria and their corresponding results.

Eligibility Criteria	Results
NOT approved for PE in last 12 months	OK (green checkmark) / NO (red X)
Citizenship	OK (green checkmark) / NO (red X)
Resident of West Virginia	OK (green checkmark) / NO (red X)
Income Level	OK (green checkmark) / NO (red X) / N/A
Pregnancy	OK (green checkmark) / NO (red X) / N/A
West Virginia Foster Care	OK (green checkmark) / NO (red X) / N/A
Breast and Cervical Cancer Patient	OK (green checkmark) / NO (red X) / N/A
Patient / Caregiver Over 65	OK (green checkmark) / NO (red X) / N/A

Below the table, there is a section titled "Hospital Determined Presumptive Eligibility Status". It contains two radio buttons: "Yes, this person is eligible for Presumptive Eligibility" and "No, this person is not eligible for Presumptive Eligibility". A red box with white text is overlaid on the bottom left of the screenshot, stating: "Error: This person has previously passed PE".

13. If you determine that the patient is not eligible, select your denial reasoning and submit your determination. Now you must press the “print PDF” button for the ineligibility determination notifications. Note that if you have determined someone ineligible for PE for any reason not included as a check box you need to enter a reason in the text box next to “Other Administrative Reason”.

Once the notification has printed, give the copy to the patient.

The denial reasons you can choose from are:

- ☐ Your income exceeds the applicable income standard
- ☐ You have had a PE period previously in the past 12 months
- ☐ You are not a member of one of the following groups:
 - Children under Age 19
 - Pregnant Women
 - Individuals under 133% FPL Ages 19-64
 - Former West Virginia Foster Care Children under 26
 - Certain Individuals Needing Treatment for Breast or Cervical Cancer
 - You are not a United States citizen
 - You are not a West Virginia resident

OR you can select “Administrative Reason.” This option is for situations where you cannot say that you are determining the patient ineligible for any of the other reasons listed but the patient is ineligible because of a different reason. One example of this might be that you recognize this patient from a previous PE determination and realize that the patient is now attesting to different information in order to gain another PE determination. This option should be the least used of any in this list and the State will be monitoring the use of this option. But you do have it for these types of outlier situations.

The screenshot shows the inROADS system interface. At the top, there is a header with the inROADS logo and navigation links. Below the header, there is a table with columns for 'Applicable Criteria' and 'Reason'. The table contains several rows of criteria and reasons, with checkboxes for selection. Below the table, there is a section titled 'Reasons for Ineligibility' with a list of reasons and checkboxes. At the bottom of the interface, there is a red box containing the text 'Print for ineligibility determination notifications'.

3.4 Example Scenario

3.4.1 Example Scenario I

The patient is incapacitated and there is no authorized representative present.

If a patient is incapacitated but is accompanied by someone who has reasonable knowledge of the patient's status, that person can answer the questions needed to make a HBPE determination and the patient can still receive a HBPE determination. However, to complete the full Medicaid application, either the patient or an authorized representative must be available to answer the more detailed questions on the full application. If neither the patient nor an authorized representative is available, the AHE must save the case and schedule a follow-up with the patient (if possible) to complete the full Medicaid application.

3.4.2 Example Scenario II

The patient or authorized representative is unable to complete the full Medicaid application in real time and does not respond to AHE's follow-up.

If the patient has been determined eligible for HBPE but is unable or unwilling to complete the full Medicaid application in real time, it is the AHE's responsibility to set up a time to follow up with that patient. Should the AHE be unsuccessful in connecting with the patient at the designated follow up time and discover the patient was able to complete the full Medicaid application on their own, the AHE can send a notification to the hospital and the process is ended. However, if the patient has not completed the full Medicaid application on their own, the AHE must again follow up with the patient in an attempt to assist them in filling out the application, noting that the case will expire on the designated date.

3.4.2 Example Scenario III

The patient completes their PE determination at Hospital A but is transferred to Hospital B for further treatment. Who is responsible for completing the full Medicaid application?

In this case, Hospital A should include the patient's temporary card in the paperwork transfer to Hospital B. Additionally, Hospital A should communicate to Hospital B that the patient will need to complete their full application. Following up with the patient is Hospital A's responsibility. The responsibility of the PE patient does not leave the hospital when the patient leaves. Should Hospital B complete the full Medicaid application with the patient, it would be credited to Hospital A.

3.5 AHE Dashboard and System Administrator Functionality

1. We are now going to walk through some of the other functionality available to you in WV inROADS. This is your dashboard. When you log into the HBPE portal, this is the first page you will see and from here you can navigate to make a determination in the top right hand corner like we did earlier. However, there are a variety of other activities that you will be responsible for that are accessed from this page.

First, please note that if your hospital is also a community partner, you will be able to tap back and forth between the two portals from this screen for ease of use. If your hospital is not a community partner, you will not see the second tab at the top of this page.

Two examples of responsibilities accessible from this page that we have already discussed are both housed in the same place under the Learn More About heading. In this location, you will find a variety of helpful links such as the link to help breast or cervical patients find convenient screening centers and the link that will help PE patients find conveniently located community partners. You will find other useful links there as well to places like the desktop manual.

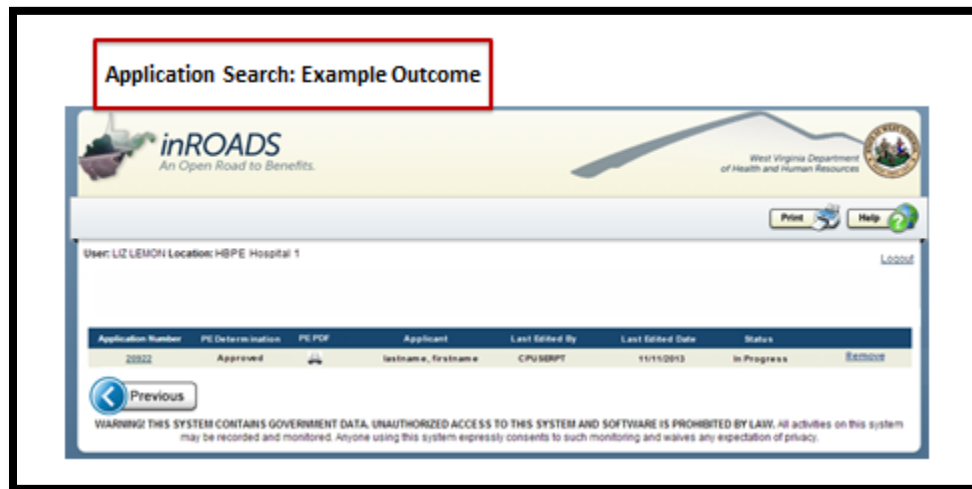
In the third example scenario, we learned that an AHE at a different hospital can complete a full Medicaid application for a patient from your hospital (or vice versa). It is from this page that you can search for patients. You can search for patients that were helped by other AHEs at your own hospital or for patients that were helped by AHEs at other hospitals. On the top of the page, you can see that there are a variety of search fields. You can use any of these fields to search for a patient. However, the most accurate will always be the patient's social security number.

Remember that if you search by SSN, the patients file will only appear as a result if they gave their SSN during their PE determination as well.

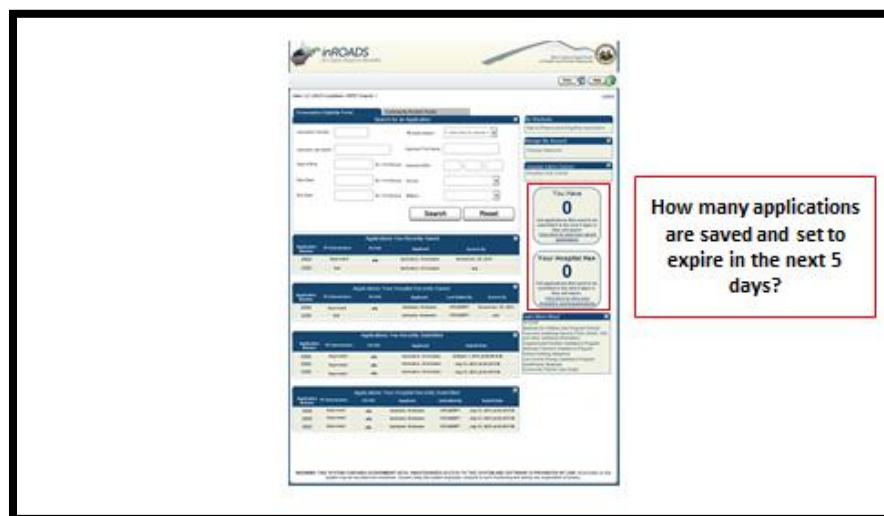


- After searching for a patient, you will see one or more applications appear on this page. If you search by the patient's SSN and the patient gave their SSN when they were first working in this portal with an AHE, there will only be one result. But if you search using other fields, there may be more than one and you will have to use the process of elimination with the patient to deduce which application is theirs.

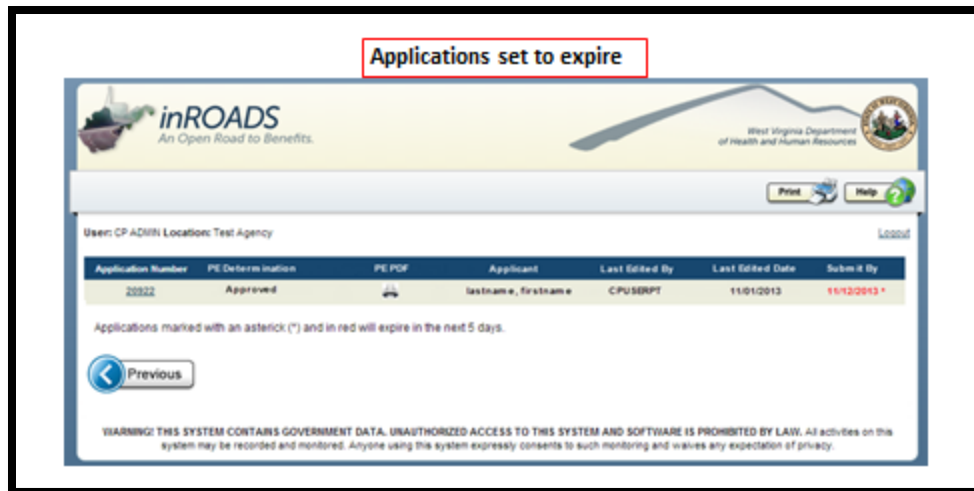
Note that you can also search for a patient in this manner if they need to re-print their temporary Medicaid card.



- From your dashboard, you can also see how many applications are set to expire. The top box indicates patients who have been determined presumptively eligible who are set to expire in the next five days. The second (lower) box is the total number of applications from your entire hospital that are set to expire in the next five days. This alert is how you will know to follow up with the patient again to make them aware that their case is going to expire in the next five days. This is also your last chance to get them to apply for full Medicaid and increase your percentage of PE patients who apply for Medicaid.



4. When you click on the icons from the previous page, you will be taken to this page that lists all the applications that are set to expire. Note that the applications marked with an asterisk and in red will expire in the next five days.



5. It is also on your dashboard that you can get a birds-eye view of PE applications that have been saved and submitted both by you and by all other AHEs at your hospital. This birds-eye view will show the 10 most recent applications for both you and your hospital.



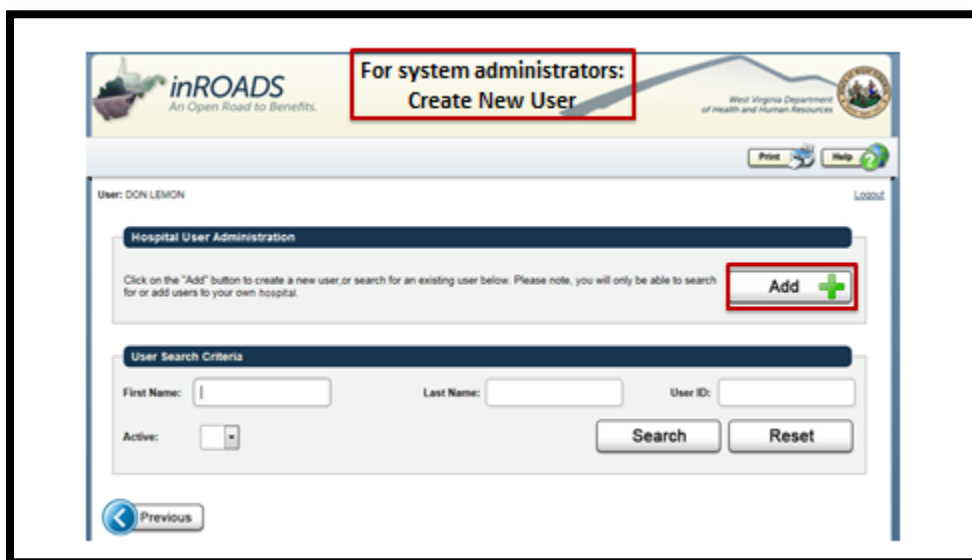
6. Additionally, the hospital user administrator will be able to manage AHEs HBPE portal access from here.

The HBPE administrator at your hospital's role will be to create and manage all AHEs User IDs and portal access for their hospital. Every hospital will have one administrator. If an AHE leaves their job for any reason, it is the administrator's job to make sure that the User ID for that employee is deactivated. It is also the administrator's job to create new User IDs and portal access for new AHEs at their hospital.

By clicking the Hospital User Admin link on the right side of the screen, the administrator can access the page needed to create and deactivate User IDs.



7. To add a new User ID, the administrator will click "add."



8. Now the administrator can enter in all the necessary information for the new AHE, including which portals they will need access to. Again, if your hospital is not already a community partner, the system administrator will not have the option to give AHEs access to both portals.

For system administrators: Create New User

User Information

First Name, Last Name, Middle Initial, Phone Number, Address Line 1, Address Line 2, City, State, Zip Code, Email Address

Portal Access: ☐ Community Partner ☐ Presumptive Eligibility

Account Information

User ID, Password, Repeat Password

Previous Create

9. After all the information for the AHE is added, the administrator will see the notice at the top of the screen that reads “User was created successfully.” You will also note that the administrator will be able to manage the access of AHEs under “User Search Results” towards the bottom of the screen.

For system administrators: Create New User

User was created successfully.

Agency User Administration

Add

User Search Criteria

First Name, Last Name, User ID, Active

Search Reset

User Search Results

User ID	First Name	Last Name	Active	Last Login Date	Update
00000001	Dudley	Lemmon	Yes		Edit

Previous Next

10. Lastly, there is another type of warning message that may appear on this screen that reads, “Unable to submit Presumptive Eligibility determination at this time. Please try again later. Note: The system is down for regularly scheduled maintenance from 5:30-6:30 am Monday-Saturday and 5:30-10 am on Sunday.”

Thus, the system does have scheduled maintenance when the backend will be down and you will not be able to submit a PE determination. When this happens, just save the application and make a note to submit it at a later time outside of these errors. In the case that you see this message outside of the listed hours, that means that the backend is experiencing technical difficulties. However, your process is the same regardless of when you see this message: save the application and submit it at a later time.

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Warning: Unable to submit PE determination at this time. Please try again later. Note: The system is down for regularly scheduled maintenance from 5:30-6:30 am Monday-Saturday and 5:30-10 am on Sunday.

Presumptive Eligibility Criteria Summary

Eligibility Criteria	Yes	No	N/A
NOT approved for PE in the last 12 months	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Citizenship	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resident of West Virginia	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Income Level	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pregnancy	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
West Virginia Foster Care	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Breast and Cervical Cancer Patient	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Hospital Determined Presumptive Eligibility Status

Based on your state's policies, please select if this person is eligible for Presumptive Eligibility:

☒ Yes, this person is eligible for Presumptive Eligibility.

☐ No, this person is not eligible for Presumptive Eligibility.

Submit Determination

4 Full Medicaid Application Process

1. We are now going to walk through the Full Medicaid application that can be accessed in WV inROADS straight from the page where you determine a patient's eligibility. Please note, however, that the button that will bring you to this page to begin the Medicaid application will only appear if the patient is determined PE. Additionally, WV inROADS will only show the pages that are relevant to the patient situation. This means that certain pages of this slide deck will not appear in every instance.

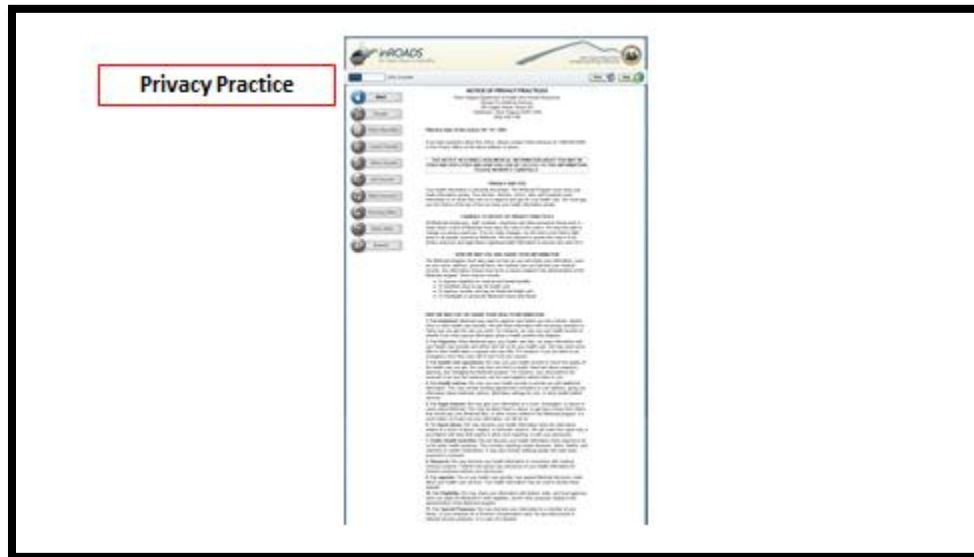
It is very important to note that you are not required to assist patients in completing any other applications except for the full Medicaid application. If the patient asks about applying to other programs, you are encouraged to point them to their local DHHR office or to WV inROADS at www.wvinroads.org.

- AHEs are not required to assist patients in completing any other applications except for the Medicaid Stream-Lined Application.
- If patients ask AHEs about applying to other programs, the AHEs may point the patients to their local DHHR office or WV inROADS (<https://www.wvinroads.org>).

2. The Program Selection page allows AHEs to select the programs the customer wishes to apply for. The Healthcare Benefits program will always be pre-selected and protected. Keep in mind that you are only required to assist with the full Medicaid application.

The screenshot shows the 'Program Selection' page in the WV inROADS system. The page is titled 'Program Selection' and has a sub-header 'Which Benefits Would You Like to Apply For?'. Below this, there is a list of benefits with checkboxes. The 'Healthcare Benefits (Medicaid, CHIP) or a Qualified Health Plan (QHP)' option is pre-selected and highlighted with a red box. Other options include 'Supplemental Nutrition Assistance Program (SNAP)', 'Medicaid Premium Assistance Programs (Red, White, Blue card)', 'School Clothing Allowance (SCA)', and 'Low Income Energy Assistance Program (LIEAP)'. The page also includes a 'Previous' button, a 'Save & Exit' button, and a 'Next' button.

3. The Privacy Practice is where the patient can assert that they trust you to help them with their Medicaid Application and that the information they divulge will be confidential. You must read each line to the patient or allow the patient to see the screen to read it themselves.



4. You must read the information on each screen to the patient and walk them through the process. You can see that under Responsible Persons, you will need to select who is answering the questions in the Medicaid application. For this section, you should be referring to the person that will be answering the questions.

After you have filled out these sections, select “Next.”



5. If the person answering these questions is an authorized representative, please enter that person's contact information here and select "Next."

The screenshot shows the 'inROADS' web application interface. At the top, there is a header with the 'inROADS' logo and the text 'An Open Road to Benefits'. To the right of the logo is a red-bordered box containing the text 'Contact Information - Authorized Representative'. Below the header, there is a sidebar on the left with a list of icons and labels: Start, People, Insurance, Liquid Assets, Other Assets, Job Income, Other Income, Housing Bills, Other Bills, and Submit. The main content area is titled 'Contact Information' and contains the following fields: First Name, Middle Initial, Last Name, Street Address, Address Line 2, City, State (a dropdown menu with the text 'click here to choose'), Zip Code, and Phone Number. At the bottom of the form, there is a question: 'Should the individual receive a copy of all notices sent to you?' with radio buttons for 'Yes' and 'No'. Navigation buttons are located at the bottom: 'Previous', 'Save & Exit', and 'Next' (which is highlighted with a red box and a green arrow).

6. This page is where an authorized representative will be entering their information.

The screenshot shows the 'inROADS' web application interface. At the top, there is a header with the 'inROADS' logo and the text 'An Open Road to Benefits'. To the right of the logo is a red-bordered box containing the text 'Contact Information - Authorized Representative'. Below the header, there is a sidebar on the left with a list of icons and labels: Start, People, Insurance, Liquid Assets, Other Assets, Job Income, Other Income, Housing Bills, Other Bills, and Submit. The main content area is titled 'Contact Information' and contains the following fields: First Name, Middle Initial, Last Name, Organization Name, and Organization ID Number. Navigation buttons are located at the bottom: 'Previous', 'Save & Exit', and 'Next' (which is highlighted with a red box and a green arrow).

7. On the next page, you can ask the patient if they have a friend or relative that can be contacted by phone. This page is entirely optional, if the patient does not wish to provide an additional phone contact, you may skip this page by selecting “Next.” This page will only be displayed if they indicate that they have contact information to provide on the Application Details page.

The screenshot shows the 'Additional Contact Information - optional' page in the inROADS system. The page has a header with the inROADS logo and the text 'Additional Contact Information - optional'. Below the header, there is a progress bar indicating '3% Complete'. On the left side, there is a vertical menu with buttons for 'Start', 'People', 'Other Benefits', 'Liquid Assets', 'Other Assets', 'Job Income', 'Other Income', 'Housing Bills', 'Other Bills', and 'Submit'. The main content area is titled 'Phone Contact' and contains the instruction: 'Please tell us about the friend or relative who can be contacted by phone and provide at least one number where they can be reached.' Below this instruction, there are input fields for 'First Name', 'Middle Initial', 'Last Name', and 'Suffix'. There are also input fields for 'Cell Phone Number', 'Home Phone Number', and 'Work Phone Number'. At the bottom of the page, there are three buttons: 'Previous', 'Save & Exit', and 'Next'. The 'Next' button is highlighted with a red box.

8. This is the registration page where you will be inputting much of the patient's contact information. Select “Next” when the page is complete.

The screenshot shows the 'Registration Information' page in the inROADS system. The page has a header with the inROADS logo and the text 'Registration Information'. Below the header, there is a progress bar indicating '3% Complete'. On the left side, there is a vertical menu with buttons for 'Start', 'People', 'Other Benefits', 'Liquid Assets', 'Other Assets', 'Job Income', 'Other Income', 'Housing Bills', 'Other Bills', and 'Submit'. The main content area contains several sections with input fields for personal information, including 'First Name', 'Last Name', 'Date of Birth', 'Sex', 'Race', 'Ethnicity', 'Marital Status', 'Religion', 'Education', 'Employment', 'Income', 'Assets', 'Liabilities', 'Housing', 'Transportation', 'Health Insurance', and 'Other Information'. At the bottom of the page, there are three buttons: 'Previous', 'Save & Exit', and 'Next'. The 'Next' button is highlighted with a red box.

9. This page is a review page of all the information that you have entered into the system so far. When you arrive at this page, you can ask the patient if they would like to change any of the answers to the questions they were just asked or if they would like to move on to the next step. If they are prepared to move on, you may select “Next” to go to the next page.

The screenshot shows the 'inROADS' 'Registration Summary' page. The page has a sidebar on the left with icons for 'Start', 'People', 'Other Benefits', 'Liquid Assets', 'Other Assets', 'Job Income', 'Other Income', 'Housing Bills', 'Other Bills', and 'Submit'. The main content area is titled 'Registration Summary' and contains a 'Basic Information Summary' section. This section includes a table with columns for 'Name', 'Address', 'County', 'Language', 'Contact', and 'Change'. Below this is a section for 'Review Your Answers: Help From Others' with a table for 'Name', 'Authorized Representative', and 'Change or Delete'. At the bottom, there is a 'Review Your Answers: Special Needs' section with a 'Change or Delete' button. The page has a '100% Complete' status bar at the top right and a 'Next' button at the bottom right.

10. This page is all about other household members and individuals who are not part of the household but are on the patient’s tax return. To add more than one other person, select “Yes” under the “Add Another Individual” section until everyone the patient needs to add has been included.

If the patient does not have any other people to add, scroll to the bottom of the screen and select “No” under the “Add Another Individual” section.

Please note that this page will also ask the patient if they have had PE in the past 90 days. If the patient has had PE in that time, they will enter their PE ID which they will have from their eligibility print-out. This allows the system to tie the patient’s PE determination to their Medicaid Application.

The screenshot shows the 'inROADS' 'Household Member Details' page. The page has a sidebar on the left with icons for 'Start', 'People', 'Other Benefits', 'Liquid Assets', 'Other Assets', 'Job Income', 'Other Income', 'Housing Bills', 'Other Bills', and 'Submit'. The main content area is titled 'Household Member Details' and contains a form for adding household members. The form has a 'Name' field, an 'Address' field, a 'County' field, a 'Language' field, a 'Contact' field, and a 'Change' button. Below this is a section for 'Review Your Answers: Help From Others' with a table for 'Name', 'Authorized Representative', and 'Change or Delete'. At the bottom, there is a 'Review Your Answers: Special Needs' section with a 'Change or Delete' button. The page has a '100% Complete' status bar at the top right and a 'Next' button at the bottom right.

11. This page will verify if the patient or if any of the other household members are pregnant. Any additional household members you may have added from the page before will be populated on this page and you can select any that may be pregnant and select “Next” when you are finished.

The screenshot shows the 'Pregnancy' section of the inROADS application. The header includes the inROADS logo and the West Virginia Department of Health and Human Resources. A progress bar indicates '10% Complete'. On the left, a sidebar lists various sections: Start, People, Liquid Assets, Other Assets, Job Income, Other Income, Housing Bills, Other Bills, and Submit. The main content area is titled 'Pregnancy Information' and contains the text: 'Next, we need to know if anyone in your home is pregnant.' Below this is a section titled 'Pregnancy (Required)' with the instruction: 'Please check the box for any female in your home who is pregnant.' There are two checkboxes: 'No one' and 'Yes'. The 'Yes' checkbox is selected, and a dropdown menu shows 'Suze'. At the bottom, there are buttons for 'Previous', 'Save & Exit', and 'Next'. The 'Next' button is highlighted with a red box.

12. This page deals with household relationships. You will go through each household member and enter how they are related to the patient that is applying for Medicaid. If you indicated that one of the household members (or the patient) was pregnant, you can enter more information about that pregnancy on this page. Note that this pregnancy information is not required, however, so while you should ask the patient, they are not required to provide a response.

Select “Next” to continue.

The screenshot shows the 'Household Relationships' section of the inROADS application. The header includes the inROADS logo and the West Virginia Department of Health and Human Resources. A progress bar indicates '10% Complete'. On the left, a sidebar lists various sections: Start, People, Liquid Assets, Other Assets, Job Income, Other Income, Housing Bills, Other Bills, and Submit. The main content area is titled 'Household Relationships' and contains the text: 'Please let us know the people in your home are related to each other.' Below this are two sections for relationships: 'Nick's Relationship to Suze' and 'Suze's Relationship to Baby'. Each section has a dropdown menu to select a person and a checkbox for 'Is Nick/Caring for Suze?'. The 'Is Nick/Caring for Suze?' checkbox is selected, and a dropdown menu shows 'Suze'. Below these sections is a section titled 'Suze's Pregnancy Information' with fields for 'What is Suze's due date?', 'How many babies is Suze expecting from this pregnancy?', and 'When was the diagnosis date?'. Each field has a dropdown menu to select a date. At the bottom, there are buttons for 'Previous', 'Save & Exit', and 'Next'. The 'Next' button is highlighted with a red box.

13. The purpose of this page is to gather some additional information about the people in the patient's home. After you have asked the questions about whether anyone in the patient's home is blind, disabled, or a member of foster care, you can select "Next."

The screenshot shows the 'Household Members Questions (applicant)' form in the inROADS system. The form is titled 'Household Members Questions (applicant)' and is part of a larger application. It includes a sidebar with navigation links: Start, People, Other Benefits, Liquid Assets, Other Assets, Job Income, Other Income, Housing Bills, Other Bills, and Submit. The main content area has a progress bar at the top showing '20% Complete'. The form is divided into three sections: 'Other Questions About People in Your Home', 'Blind or Disabled (Household)', and 'Foster Care (Household)'. The 'Blind or Disabled' section asks the user to check the box for anyone who is disabled, blind, or unable to work because of stress or injury, with options for 'No one', 'NICK', 'SUZIE', and 'BILLY'. The 'Foster Care' section asks if anyone in foster care is age 18 or older, with options for 'No one' and 'JACK'. At the bottom, there are buttons for 'Previous', 'Save & Exit', and 'Next'.

14. School Enrollment questions will be asked for each individual in the household. These questions are optional and can be skipped by clicking "Next".

The screenshot shows the 'School Enrollment (applicant)' form in the inROADS system. The form is titled 'School Enrollment (applicant)' and is part of a larger application. It includes a sidebar with navigation links: Start, People, Other Benefits, Liquid Assets, Other Assets, Job Income, Other Income, Housing Bills, Other Bills, and Submit. The main content area has a progress bar at the top showing '90% Complete'. The form is divided into two sections: 'School Enrollment' and 'School Enrollment Details'. The 'School Enrollment' section asks the user to answer a few questions about whether Nick is in school. The 'School Enrollment Details' section asks the user to tell us whether Nick is in school right now, with a dropdown menu for 'CLICK Here to Choose'. At the bottom, there are buttons for 'Previous', 'Save & Exit', and 'Next'.

15. Now you will be able to review all of the household members' information you just put in for the patient. If the patient would like to change any information or add any other household members, you can do that on this page. Once complete, select "Next."

The screenshot shows the 'Household Members Summary' page in the inROADS system. A red box highlights the title 'Household Members Summary'. The page displays a list of household members with columns for Name, Date of Birth, and Address. At the bottom right, a red box highlights the 'Next' button.

16. Next, you will ask the patient if anyone plans to file a federal income tax return next year. It is important to reassure the patient that they can still apply for insurance even if they do not file a federal income tax return. However, you will select any that apply on this page and then select "Next."

The screenshot shows the 'Tax Filing Question' page in the inROADS system. A red box highlights the title 'Tax Filing Question'. The page displays a 'Tax Filing Information' section with a text box explaining the purpose of the question. Below this is a 'Federal Income Tax' section with a checkbox for 'No one' and four checkboxes for individual household members: Nick, Sue, Chris, and Jack. At the bottom right, a red box highlights the 'Next' button.

17. Here you will be gathering details around the patient's tax filing. If the patient indicated that they will not be filing a federal income tax this year, the system will not present this page to be filled out.

The screenshot shows the 'Tax Filing Details' page. The sidebar on the left contains links for Start, People, Tax Filing, Liquid Assets, Other Assets, Job Income, Other Income, Housing Bills, Other Bills, and Submit. The main content area is titled 'Tax Filing Details' and includes a 'Next & Exit' button at the bottom right.

18. Here is a summary of the tax information. This page gives the patient an opportunity to change their answers. Once the patient has agreed the answers are accurate and would like to move on, you may click “Next.”

The screenshot shows the 'Tax Filing Summary' page. The sidebar on the left contains links for Start, People, Insurance, Liquid Assets, Other Assets, Job Income, Other Income, Housing Bills, Other Bills, and Submit. The main content area is titled 'Tax Filing Summary' and includes a table with the following data:

Name	Joint Filing	Claimed Dependents	Being Claimed as a Dependent By	Change
John	Yes	Elvis Johnny		Change
John	Yes	Elvis Johnny		Change

Below the table is an 'Add a Person' section with a dropdown menu and an 'Add' button.

19. This page asks questions about the insurance coverage that the people in the patient's home may have. If they do not have insurance coverage, you can select "no one."

The screenshot shows the 'Insurance Questions' page in the inROADS system. The page has a sidebar on the left with a navigation menu. The main content area contains three sections: 'Insurance Questions', 'Health Insurance', and 'Medicaid'. Each section has a title, a brief description, and a set of radio buttons for 'Yes' and 'No'. The 'Health Insurance' section is currently selected. At the bottom right, there is a green 'Next' button with a right arrow.

20. If the patient indicated that one or more members of their household had healthcare coverage, this page will ask some follow up questions. Once this page is complete, select "Next" to move on.

The screenshot shows the 'Healthcare Coverage Details' page in the inROADS system. The page has a sidebar on the left with a navigation menu. The main content area contains three sections: 'Health Insurance', 'Medicaid', and 'Medicare'. Each section has a title, a brief description, and a set of radio buttons for 'Yes' and 'No'. The 'Health Insurance' section is currently selected. At the bottom right, there is a green 'Next' button with a right arrow.

21. Here you will gather some more information about the type of coverage the household member with health coverage has.

The screenshot shows the 'inROADS' web application interface. At the top, the title 'Healthcare Coverage Selections' is highlighted with a red box. Below the title, a progress bar indicates '35% Complete'. The main content area is titled 'Heath Coverage' (note the typo) and contains the instruction: 'You've told us that Nick is enrolled in health coverage now. Please check the boxes to tell us what type of health coverage Nick has.' Below this, a section titled 'Health Coverage Nick is Enrolled In' (note the typo) lists several options with checkboxes: Medicaid, CHIP, Medicare, VA health care Programs, Peace Corps, and TRICARE (with a note: '(do not check if you have direct care or Line of Duty)'). At the bottom of the form, there are three buttons: 'Previous' (with a left arrow), 'Save & Exit' (with a floppy disk icon), and 'Next' (with a right arrow and a green circle, highlighted with a red box).

22. If the patient indicated that a household member has lost their health insurance in the past 90 days, this page will ask for some more information about the circumstances surrounding the loss of the insurance.

The screenshot shows the 'inROADS' web application interface. At the top, the title 'Lost Health Insurance Details' is highlighted with a red box. Below the title, a progress bar indicates '25% Complete'. The main content area is titled 'Lost Health Insurance Details' and contains the instruction: 'Please tell us a little bit more about Nick's lost health insurance coverage'. Below this, there are two input fields: 'Date insurance coverage ended:' with a date picker (example: 'Ex. mm/dd/yyyy') and 'What is the reason for loss of health insurance?' with a dropdown menu (example: 'Click here to choose'). At the bottom of the form, there are three buttons: 'Previous' (with a left arrow), 'Save & Exit' (with a floppy disk icon), and 'Next' (with a right arrow and a green circle, highlighted with a red box).

23. The purpose of this page is to give the patient the opportunity to change any of the answers they have given in the past section. If the patient confirms that they are ready to move on, select “Next” to proceed to the next section.

The screenshot shows the 'Insurance Summary' page in the inROADS system. The page has a sidebar on the left with navigation buttons: Start, People, Financial Assets, Other Assets, Job Income, Other Income, Housing Status, Other Status, and Summary. The main content area is titled 'Insurance Summary' and contains several sections for reviewing and editing insurance information. At the bottom right, there is a red-bordered button labeled 'Next' with a green arrow icon.

24. This section is about the job income of the patient and the household members who have jobs or are self-employed.

The screenshot shows the 'Job Income Questions' page in the inROADS system. The page has a sidebar on the left with navigation buttons: Start, People, Financial Assets, Other Assets, Job Income, Other Income, Housing Status, Other Status, and Summary. The main content area is titled 'Job Income Questions' and contains sections for 'Job Income Information', 'Current or Recent Job', and 'Self-Employment'. At the bottom right, there is a red-bordered button labeled 'Next' with a green arrow icon.

25. If the patient indicated that they or a member of their household had a job, this page will ask for some details about their job. Note that if the person has multiple jobs, you may select “Yes” under the “Add Another” section at the bottom of the screen. Once this page is complete, select “Next”.

The screenshot displays the 'EMPLOYMENT DETAILS' page in the iVROADS system. The page layout includes a top header with the iVROADS logo and navigation links, a left sidebar with various user icons, and a main content area. The main content area is titled 'EMPLOYMENT DETAILS' and contains four sections, each with a form for entering employment information. The sections are: 'EMPLOYMENT HISTORY', 'EMPLOYMENT DETAILS', 'EMPLOYMENT HISTORY', and 'EMPLOYMENT DETAILS'. The 'EMPLOYMENT DETAILS' section is highlighted with a red box. The form fields include Name, Address, City, State, Zip, and Date. The 'EMPLOYMENT DETAILS' section is highlighted with a red box.

26. If the patient indicated self-employment on the previous page, you will need to ask the patient the type of self-employment. You do not need to read all the options, just ask the patient what type of work they are in and choose the most relevant option. If you don't see any options that match what the patient is describing, you can select "Other" and type in an explanation.

[illegible]

27. Here the patient will be able to explain in more detail about their self-employment status including income and business expense information. You can also select “yes” under “Add Another” if the patient has more than one self-employment position.

The screenshot shows the 'Self-Employment Details' section of the inROADS application. The title 'Self-Employment Details' is highlighted with a red box. The form is titled 'More About Nick's Self-Employment - Babysitting'. It contains a text area for 'How much money does Nick make each month from self-employment? Please give us the amount that Nick earns before any taxes, deductions, or expenses are taken out.' and a text area for 'How much are Nick's business expenses each month?'. Below these is a section titled 'Add Another?' with a question 'Does Nick have another self-employment job for babysitting?' and radio buttons for 'Yes' and 'No'. At the bottom, there are buttons for 'Previous', 'Save & Exit', and 'Next', with the 'Next' button highlighted by a red box.

28. As with the previous sections, the patient has the opportunity to review and change any of the answers they gave in the job income section of the application. Once the patient indicates that they are ready to move on, you may select “Next.”

The screenshot shows the 'Job Income Summary' section of the inROADS application. The title 'Job Income Summary' is highlighted with a red box. The form is titled 'Job Income Summary' and contains a text area for 'There is a summary of what you've told us. If you would like to change your answers or finish a section click on "Change" or "Next". If you would like to remove something, click on "Remove".' Below this is a table with columns for 'Job', 'Employer', 'Job Title', 'Start Date', 'End Date', 'Status', and 'Change or Remove'. There are two rows of data. Below the table is a section titled 'Add a Job or Self-Employment' with a text area for 'To add a job for a summary in your home, please choose their name and click the Add button.' and a button labeled 'Add'. At the bottom, there are buttons for 'Previous', 'Save & Exit', and 'Next', with the 'Next' button highlighted by a red box.

29. This section is about other types of income the patient or the people in the patient's household might have other than a job or self-employment. If the patient is unsure about what counts as "other income," you can select "Help" in the top right hand corner to explain further.

Once the patient has answered these two questions this page is complete.

The screenshot shows the 'inROADS' application interface. A red box highlights the 'Other Income Questions' title. The left sidebar contains a list of navigation options: Start, People, Insurance, Capital Assets, Other Assets, Job Income, Other Income, Pending Bills, Other Bills, and Submit. The main content area is titled 'Money From Other Sources' and includes instructions: 'Next, please tell us about the money that the people in your home get from sources other than a job or self-employment. If you're not sure about a source of income, click on Help to read more about what we're looking for.' Below this, there are two sections: 'Social Security Income' and 'Other Income'. Each section has a 'No one' option and a 'Yes' option with a 'Help' link. At the bottom right, a red box highlights the 'Next' button.

30. Similar to the self-employment question, select the option that is closest to the patient's description. You should note, however, that this page does not offer an "other" option. If the patient is describing something else, the application does not consider it a valid income type.

The screenshot shows the 'inROADS' application interface. A red box highlights the 'Other Income Type Selection' title. The left sidebar is identical to the previous screen. The main content area is titled 'Other Types of Income' and includes instructions: 'Next, check the boxes to tell us which types of other income each person gets. If you need to know more about a type of income listed below, please click on Help.' Below this, there is a section titled 'Mark Income Information' with a list of income types, each with a checkbox. The list includes: Adoption Assistance, Black Lung, Disability Income, Educational Aid, Farm Income, Interest, Military Allowance, Other Income (Specify: Job Corp Allowance etc.), Pension or Retirement, Rental Income, Spouse's Support, Supplement (Other than Health/Disability), Unemployment Benefits, Assistance from Another State, Social Child Support, Dividends, Non-EMT Energy Assistance, Foster Care Payments, Lottery Winnings, Money from Another Person, Payments from an Annuity, Planned Parenthood, Royalties, Supplement (not Health/Disability), Trust Fund, Veterans Benefits, and Worker's Compensation. At the bottom right, a red box highlights the 'Next' button.

31. Depending on what type of income type you selected on the previous page, the system will ask some additional questions here. You can add another type of income if the patient has more than one by selecting “yes” under Add Another.

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Other Income Details

50% Complete

More About Nick's Adoption Assistance

You've told us that Nick gets money from Adoption Assistance. Please answer the questions below to tell us more about this payment. If you get this type of payment only a few times a year, please choose monthly and estimate how much this payment would be each month.

How often does Nick get payments from Adoption Assistance?

How much is each payment from Adoption Assistance?

Add Another?

Does Nick have any other income for Adoption Assistance? ☐ Yes ☐ No

[Previous](#) [Save & Exit](#) [Next](#)

32. On the Income Summary page, the patient will be able to change any of the answers that they have given in this section. Once the patient has indicated they are ready to move on, you can select “Next”.

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Other Income Summary

70% Complete

Other Income Summary

Here is a summary of what you've told us. If you would like to change your answers or finish a section click on "Change" or "Add". If you would like to remove something, click on "Delete".

Name	Type	How Much	Frequency	Action
Nick	Adoption Assistance	\$ 200	Monthly	Change Delete
Nick	Foster Care Payments	\$ 200	Every Two Weeks	Change Delete
Nick	Social Security	\$ 200	Every Two Weeks	Change Delete
Nick	Unemployment	\$ 200	Every Two Weeks	Change Delete

Add Another

To add a type of other income, please choose the person and the type of income, then click the Add button.

Name: Type:

[Previous](#) [Save & Exit](#) [Next](#)

33. Here you will be asking the patient questions about the bills that they pay.

The screenshot shows the 'Other Bills Question' screen in the inROADS application. The title 'Other Bills Question' is highlighted with a red box. The screen features a sidebar on the left with navigation buttons: Start, People, Insurance, Liquid Assets, Other Assets, Job Income, Other Income, Housing Bills, Other Bills, and Submit. The main content area has a progress bar at the top showing '10% Complete'. Below the progress bar, there is a section titled 'Your Other Bills' with the instruction: 'Next, please tell us about some of your other bills.' This is followed by a 'Deduction' section with the instruction: 'Please check the box for anyone who pays for alimony, student loan interests or other payment that can be deducted on a federal income tax return.' There are two checkboxes labeled 'No one' and 'Spouse' with corresponding icons. At the bottom of the main content area, there are three buttons: 'Previous', 'Save & Exit', and 'Next'. The 'Next' button is highlighted with a red box.

34. The more deductions that the patient can identify in their household, the lower the cost of their health coverage can be. It is your job to help the patient correctly identify their deductions for the purpose of this application.

The screenshot shows the 'Deduction Type Selections' screen in the inROADS application. The title 'Deduction Type Selections' is highlighted with a red box. The screen features a sidebar on the left with navigation buttons: Start, People, Insurance, Liquid Assets, Other Assets, Job Income, Other Income, Housing Bills, Other Bills, and Submit. The main content area has a progress bar at the top showing '10% Complete'. Below the progress bar, there is a section titled 'Deductions' with the instruction: 'You've told us that Rick pays for things that can be deducted on a federal income tax return, telling us about them could make the cost of health coverage a little lower.' This is followed by a 'Deductions Paid' section with a list of checkboxes for various deductions. The list is organized into two columns. The first column includes: Alimony Paid, Business Expense, Business Loss, Capital Losses and Expenditures, Deductible Part of Self-Employment Tax, Domestic Production Activities Deduction, and Section 511 Foreign Housing Cost Amount. The second column includes: Self-Employed Health Insurance Deduction, Health Savings Account Deduction, Moving Expenses, Other Losses, Penalty on Early Withdrawal of Savings, Student Loan Interest, and Tuition and Fees Deduction. At the bottom of the main content area, there are three buttons: 'Previous', 'Save & Exit', and 'Next'. The 'Next' button is highlighted with a red box.

35. If you indicate that the patient is enrolled in school, the system will ask about the patient's student loan payments. If the patient makes any other student loan payments, you may select "yes" under "Add Another".

The screenshot shows the 'Deduction Details' page in the inROADS system. The page has a sidebar on the left with navigation buttons: Start, People, Insurance, Liquid Assets, Other Assets, Job Income, Other Income, Housing Bills, Other Bills, and Submit. The main content area is titled 'Deduction Details' and includes a progress bar at the top showing '85% Complete'. Below the progress bar, there is a section titled 'More About Nick's Deduction Payment' with instructions: 'You've told us that Nick pays for student loan interest, please tell us the amount and how often Nick pays it.' It contains two input fields: 'How often does Nick make payments?' with a dropdown menu and 'How much is each payment?' with a text input field. Below these is an 'Add Another?' section with the question 'Does Nick make any other student loan interest payment?' and radio buttons for 'Yes' and 'No'. At the bottom, there are buttons for 'Previous', 'Save & Exit', and 'Next'.

36. This is the "Other Bills" Summary page where the patient again has the opportunity to make changes to the answers they gave in this section.

The screenshot shows the 'Other Bills Summary' page in the inROADS system. The page has a sidebar on the left with navigation buttons: Start, People, Insurance, Liquid Assets, Other Assets, Job Income, Other Income, Housing Bills, Other Bills, and Submit. The main content area is titled 'Other Bills Summary' and includes a progress bar at the top showing '85% Complete'. Below the progress bar, there is a section titled 'Other Bills Summary' with instructions: 'Here is a summary of what you've told us. If you would like to change your answers or finish a section click on "Change" or "Add". If you would like to remove something, click on "Delete".' It contains a table with columns: 'Person', 'Deduction Type', 'Frequency', 'Amount', and 'Change to Summary'. The table has two rows: 'Student Loan Interest' with frequency 'Monthly' and amount '\$100', and 'Mortgage' with frequency 'Every Two Weeks' and amount '\$100'. Below the table is an 'Add a Deduction' section with instructions: 'To add a deduction, please choose the person and the deduction category, then click the Add button.' It contains two dropdown menus: 'Name' and 'Type', and an 'Add' button. At the bottom, there is an 'Application Review' section with instructions: 'Please review your application and make any edits needed before you continue. You will not be able to add any of the previous section once you click on the "Next" button.' At the bottom, there are buttons for 'Previous', 'Save & Exit', and 'Next'.

37. After the Other Bills Summary screen, WV inROADS will determine whether individuals in the household are eligible for Medicaid. If any individual in the household is found ineligible for Medicaid, the system will need to ask a few more questions in order to see if the individual qualifies for insurance subsidies. Note that the answers to these questions will not impact the result of any benefit programs.

The screenshot shows the 'Yearly Income Question' screen in the inROADS system. The title 'Yearly Income Question' is highlighted with a red box. The screen features a sidebar on the left with navigation buttons: Start, People, Insurance, Liquid Assets, Other Assets, Job Income, Other Income, Housing Bills, Other Bills, Finish, and Submit. The main content area has a progress bar at the top showing '50% Complete'. Below the progress bar, there is a section titled 'Additional Questions from the Federally Facilitated Marketplace' with a note about insurance subsidies. This is followed by a 'Yearly Income' section with a sub-header 'Yearly Income assumed'. It asks the user to check the box for anyone whose income changes from month to month. There are four radio button options labeled Nick, Rose, Baby, and Jack. At the bottom, there are buttons for 'Previous', 'Save & Exit', and 'Next'. The 'Next' button is highlighted with a red box.

38. Here are two questions regarding the patient's yearly income. Once the patient has estimated their answers to the best of their ability, you may select "Next."

The screenshot shows the 'Yearly Income Details' screen in the inROADS system. The title 'Yearly Income Details' is highlighted with a red box. The screen features a sidebar on the left with navigation buttons: Start, People, Insurance, Liquid Assets, Other Assets, Job Income, Other Income, Housing Bills, Other Bills, Finish, and Submit. The main content area has a progress bar at the top showing '50% Complete'. Below the progress bar, there is a section titled 'More About Nick's Yearly Income' with a note about Nick's income changes. It asks the user to estimate Nick's yearly income for 'THIS year' and 'NEXT year'. There are two input fields for these estimates. At the bottom, there are buttons for 'Previous', 'Save & Exit', and 'Next'. The 'Next' button is highlighted with a red box.

39. If the patient indicates that someone on the application is offered health coverage from a job, this page will ask some follow up questions about the offered coverage.

The screenshot shows a web application interface with a sidebar on the left containing navigation links: Start, People, Insurance, Liquid Assets, Other Assets, Job Income, Other Income, Housing Bills, Other Bills, Payroll, and Outlook. The main content area is titled 'Health Coverage from Employment Details'. It contains several sections with text and form fields. At the bottom right, there is a red box highlighting a 'Next' button.

40. If the patient indicates that someone on the application is an American Indian or an Alaskan Native, the patient or authorized representative can answer these questions to qualify for subsidies.

The screenshot shows a web application interface with a sidebar on the left containing navigation links: Start, People, Insurance, Liquid Assets, Other Assets, Job Income, Other Income, Housing Bills, Other Bills, Payroll, and Outlook. The main content area is titled 'AI/AN Details'. It contains several sections with text and form fields. At the bottom right, there is a red box highlighting a 'Next' button.

41. Just like all the other sections, the patient will have the opportunity to review and confirm the answers they gave to the additional questions from the Federally Facilitated Marketplace. Once they have confirmed, you can select “Next.”

The screenshot shows the 'Additional Information Summary' page of the inROADS application. A red box on the left side of the page is labeled 'Additional Information Summary'. The main content area displays a summary of the information entered in previous sections, including personal details, household information, and insurance details. At the bottom right, there is a green 'Next' button with a right-pointing arrow.

42. This is the final page of the application that includes an electronic signature of the patient that indicates two things:
1. That the information given has been true and correct and that they accept the responsibilities
 2. That all statements have been read by the patient or read to the patient and that the patient understands the questions

Note: The Rights and Responsibilities section will populate with the Rights and Responsibilities of the program(s) for which the household is applying.

Once this page is complete, you can select “Submit”!

The screenshot shows the 'Application Submission' page of the inROADS application. A red box on the left side of the page is labeled 'Application Submission'. The main content area contains a large text area for a statement or signature, followed by a section for 'Application Submission' with checkboxes for 'I agree' and 'I disagree'. At the bottom, there is a green 'Submit' button with a right-pointing arrow.

43. You should give the patient the tracking number for their application shown in the first box and offer to print them a copy of their application located in the third section of this page. Once all of the patient's questions have been answered and they have their application tracking number, you may select "Exit" and end the process with the patient.

This concludes the process of the full Medicaid application in WV inROADS after a patient has been determined eligible for HBPE.

Explain to the patient that his/her application has been submitted to their local DHHR office and that they will receive information via mail regarding their Medicaid application. If they are not eligible for Medicaid, their information will be sent to the Federally Facilitated Marketplace who will contact them.

The screenshot displays the 'Thank You' page of the WV inROADS application process. A red-bordered callout box on the left, titled 'Next Steps Overview - send to FFM', highlights the final steps. The main content area includes:

- Thank You:** A message stating that the application for Medicaid or WV DSHS has been received and that the patient may be eligible for health care coverage in the Health Insurance Marketplace. It provides contact information for the Health Insurance Marketplace (1-800-318-2288).
- Track your application:** A section showing the tracking number '0000000000' and instructions to write this number down or print the page for records. It also provides a Customer Service Center number (1-800-318-2288) for further assistance.
- Optional Survey:** A section with a 'Survey' button, inviting the patient to take a short survey about their online application process.
- Print Your Application:** A section with a 'Print My Application' button, allowing the patient to print a copy of their application for their files.

At the bottom right, there is a red 'Exit' button. The page also features the WV inROADS logo and a small 'WV' logo at the bottom center.

5 Performance Measures

BMS will be tracking each hospital's performance as dictated by the following measurements:

1. 75% of patients who have been approved for HBPE have followed up and filled out the full Medicaid application prior to their designated case expiration date.
2. 50% of patients found eligible for HBPE and who have completed the full Medicaid application were found eligible for full Medicaid benefits.

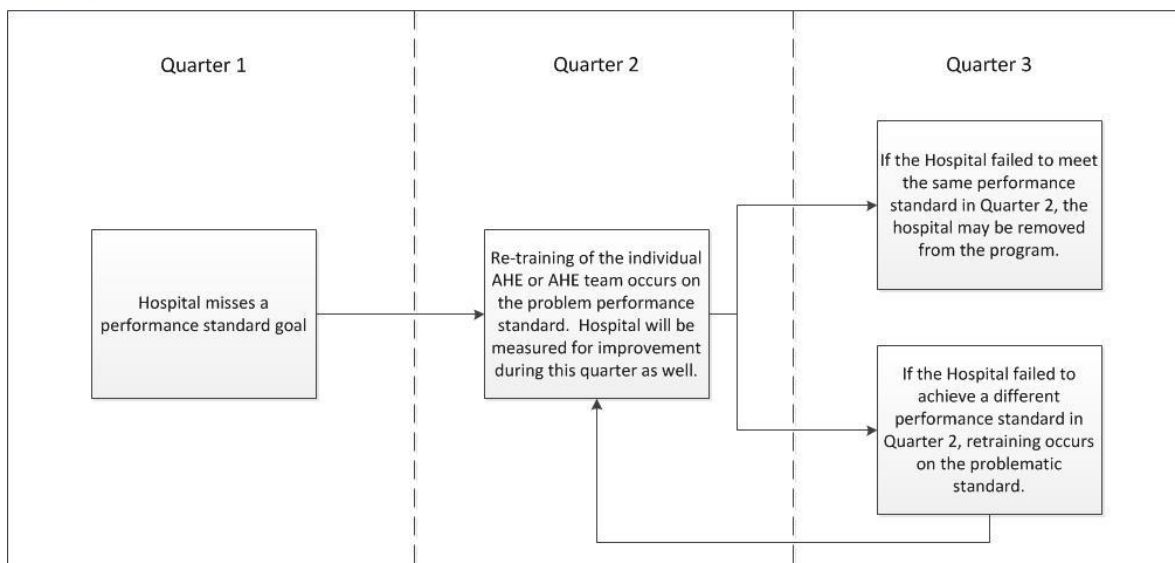
BMS will deliver performance reports to participating hospitals on a quarterly basis. These reports will provide data at the hospital level and at the individual AHE level. These reports will allow the Bureau and the hospital to evaluate whether performance issues are hospital-wide or specific to an individual AHE.

6 Corrective Action

If a hospital has missed their performance standards, they will have the opportunity to re-train and make a good faith effort to improve their performance. In addition, the hospitals will have one full quarter to recover their performance. For example, if a hospital underperformed in Quarter 1, they would see that information on their Quarter 2 report. They would re-train their AHEs in Quarter 2 and be reevaluated. If the AHE or team is still underperforming in the same area in Quarter 3, they may be removed from the HBPE program for a minimum of six months. However, if the AHE or team meets the performance standard in the problem area identified in Quarter 1 but fails to meet the performance standard in another area, they will repeat the re-training process for the new issue and go on to be evaluated for the new issue.



Hospital Based Presumptive Eligibility Corrective Action Process



When the hospital receives its quarterly report from BMS, it will need to review it and communicate to BMS any of the following reasons why the first performance measure was not met. A few example reasons that could justify an adjustment to your score are below:

- Patient died before completed full application
- Patient moved out of state before completing full application, etc.

However, the following cannot be included in your hospital's justifications:

- Patient did not answer phone
- Patient did not return voicemails, etc.

Please note that all information included in this training is subject to change. Continue to check BMS' website; if and when we change any procedures, there will be an alert posted.

7 Test

1. Which groups of individuals who reside in WV may be eligible for PE?
 - a. Children under Age 19
 - b. Pregnant Women
 - c. Individuals aged 19 to 64
 - d. Former West Virginia Foster Care Children under age 26
 - e. Certain Individuals Needing Treatment for Breast or Cervical Cancer
 - f. Incarcerated Individuals With Hospital Stays Exceeding 24 Hours
 - g. All of the above
2. You are required to assist PE patients with their full Medicaid applications.
 - a. True
 - b. False
3. Can I log in with another AHE's username and password to help them complete their patient applications?
 - a. Yes, I can log in with their information anytime
 - b. Yes, I can log in with their information, but only if I have express permission from them to do so
 - c. No, but I can help them with their case load by using the WV inROADS dashboard to search for their patient and working the case through my account
 - d. No, it is never acceptable to help with their cases
4. The same patient who was denied PE last week is trying to apply again using different information. What negative determination notification would you select?
 - a. Your income exceeds the applicable income standard
 - b. You have had a PE period previously in the past 12 months
 - c. You are not a United States Citizen
 - d. Administrative Denial (with a written explanation)
 - e. None of these
5. If a patient is transferred to your hospital and shows you their temporary medical card, you can assist them with their full Medicaid Application.
 - a. True
 - b. False

6. You are speaking with a pregnant patient. After you enter her information into WV inROADS the error reading “An individual with this SSN has been approved for presumptive eligibility in the last 12 months. Please evaluate accordingly.” How do you proceed?
 - a. Tell the patient that she cannot be determined PE at this time due to the system alerting you that she has had it in the past 12 months
 - b. Save and close the program
 - c. Proceed with the PE determination because a patient can have two PE determinations in a 12 month period if one of them is pregnancy
 - d. None of the above
7. BMS will be able to track hospital performance according to documented performance measures but will not be able to track individual AHE performance.
 - a. True
 - b. False
8. If a hospital fails to meet one of the performance measures and is able to improve their score after following the Corrective Action process, they will not be removed from the HBPE program.
 - a. True
 - b. False
9. What do you need to do after assisting a PE patient in completing and submitting their full Medicaid application?
 - a. Help the patient apply for SNAP
 - b. The process is complete
 - c. Help the patient apply for Medicare
10. When is the best time to assist a PE patient with their full Medicaid application?
 - a. Between 6 p.m. and 10 p.m.
 - b. Right after completing the HBPE questionnaire in WV inROADS
 - c. Two weeks after the patient visits the hospital
 - d. On the patient’s birthday
11. Once you have made a PE determination for a patient, what is the next step?
 - a. Print either the temporary medical card or the ineligibility determination notification and give it to the patient
 - b. Begin filling out their Medicaid application without giving them any printed PDFs from WV inROADS

- c. Talk to them about other healthcare programs they can apply for
 - d. None of these
12. If a PE patient has received their temporary medical card but refuses or is unable to complete the full Medicaid application immediately after their PE determination, what should you do?
- a. Attempt to schedule a follow-up
 - b. Explain all the ways the patient can complete their full Medicaid application
 - c. Fill out as much of the Medicaid application for the patient as possible without the patient's consent
 - d. A and B
 - e. A and C
 - f. All of the above
13. If a patient indicates that they are currently receiving treatment for breast or cervical cancer, what is the next step after the patient has received their PE determination?
- a. Assist the patient in completing their full Medicaid application
 - b. The process is complete at this point
 - c. Save and close the application
 - d. Using the tool in the AHE's dashboard, help the patient find a convenient screening facility to them and then assist them with their full Medicaid application
 - e. None of the above
14. Can an emergency room patient who is traveling in West Virginia on vacation receive hospital based presumptive eligibility?
- a. Yes
 - b. No